Tourism trends quarterly bulletin
Spring 2009 (Q2: Easter to mid July)

This bulletin provides the key findings of the tourism monitor for the period March 30th to July 19th 2009 (16 week period). This period includes the Easter bank holidays and the school holidays and continues through to just before the summer peak season. It also includes two bank holidays in May and the school spring half term holiday.

Last year Easter was extremely early and for the first time many schools took their Easter holidays in April, separately from the bank holiday weekend. This year Easter fell in April (10th – 13th) which is more typical.

Comparisons with historical data are based upon average number of visitors per week, to overcome the variations in quarter length. Where possible, comparisons are made with previous research dating back to 2002.

Introduction

The economic backdrop to this quarter was uncertain with news dominated by unemployment rising and continued uncertainty over the state of the economy. However there were some indications of improvements with April recording the first increase in consumer confidence which continued through the quarter. May saw a small increase in house prices. The pound recovered some ground against the Euro but remained below its value 12 months earlier.

Looking first at the domestic overnight tourism market[1], data is available up to the end of May. It is advisable to look at the trends for the year to date to the end of May to smooth out the year on year fluctuations due to the timing of Easter. There were 45 million overnight domestic trips from January to May which is a small increase on last year (+1%) although spend on these trips is estimated to have fallen by 3%. Holiday trips have increased the most, up by 16%, whilst business trips and VFR trips have declined (by 10% and 6% respectively). This is an improved situation versus earlier in the year when all categories of domestic tourism were down year on year.

The domestic market has held up much better than the international market, from January to May, trips abroad made by UK residents decreased dramatically, falling by 17% to 22 million[2] versus 2007. Spend on these trips is estimated to be down by 16%. Clearly the economy and uncertainty about jobs together with the weaker pound (vs. Euro and US$) has encouraged people to stay in the UK rather than travel abroad.

Turning to the Isle of Wight, there was the usual schedule of events and festivals to attract visitors. The two key events were the walking festival in May and the major music festival in mid June. Other events included the Randonnée in May (cycling), the Yarmouth Old Gaffers Festival at the end of May, the Round Island race in June (sailing) and the Ryde Regatta in early July.

During this quarter the total number of visitors to the Island increased by 7% versus 2008 and is now at its highest level for 5 years. Key statistics for this quarter are:

- Domestic staying visitors are up slightly on last year (+2%) but below 2007
- Domestic short breaks (1 – 4 nights) are up slightly on 2008 (+3%) and 2006 (+4%) but below 2007
- Domestic longer holidays (5+ nights) are up significantly on last year and at a similar level to 2007
- Domestic day visits increased by 13% versus 2008 to exceed 350,000. The most important type of day trip is leisure day visits which increased by 10% to reach 182,000
- Visits to friends/relatives increased: day visits by 15%; staying visits by 3%
- An estimated 235,000 new or lapsed visitors (5+ years) came to the Island on a leisure trip (day or staying trip).

Tourism spend is estimated at just under £170 million, a weekly average of over £10 million. This is an increase of 6% on 2007. This is due to an increase in short breaks, holidays and staying visitors from overseas plus an increase in day visitors.

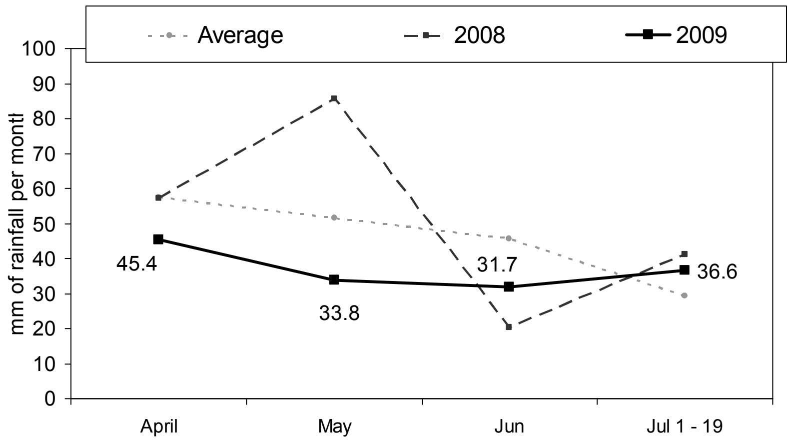
1. United Kingdom Tourism Survey produced by VisitBritain 2. International Passenger Survey.

Weather

Throughout much of the spring season the weather was very good and an improvement on spring 2008.

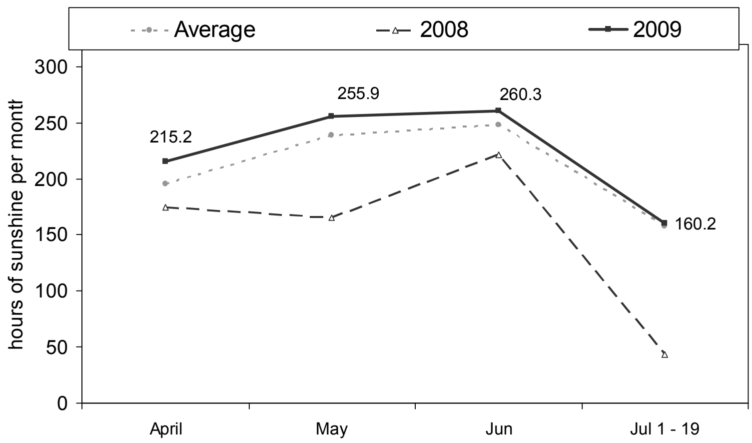
April through to June were drier and sunnier than average (20 – 35% less rainfall than average and 7 - 10% more hours of sunshine). Early July was more changeable with some wet days taking rainfall slightly over the average for the time of year but sunshine hours were around the average.

Rainfall on the Isle of Wight
Q2 2009 vs. 2008 and long term average

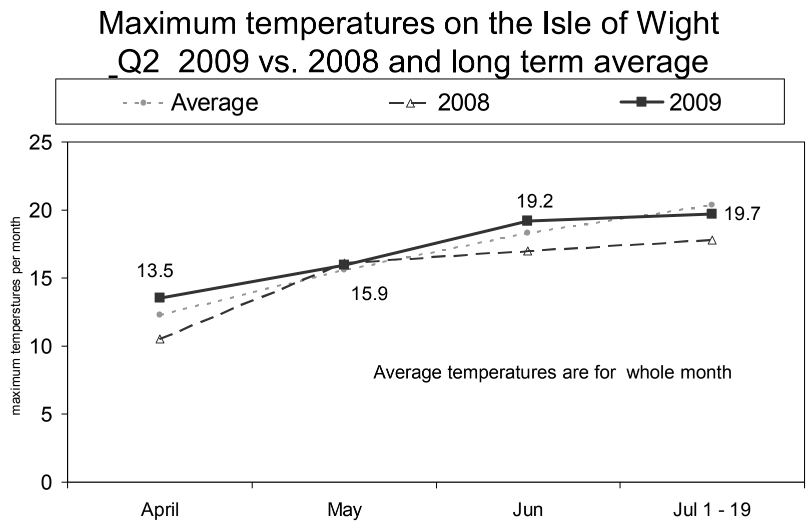


Weather data is supplied by IOW council and Medina Valley Centre

Sunshine on the Isle of Wight
Q2 2009 vs. 2008 and long term average



Weather data is supplied by IOW council and Medina Valley Centre



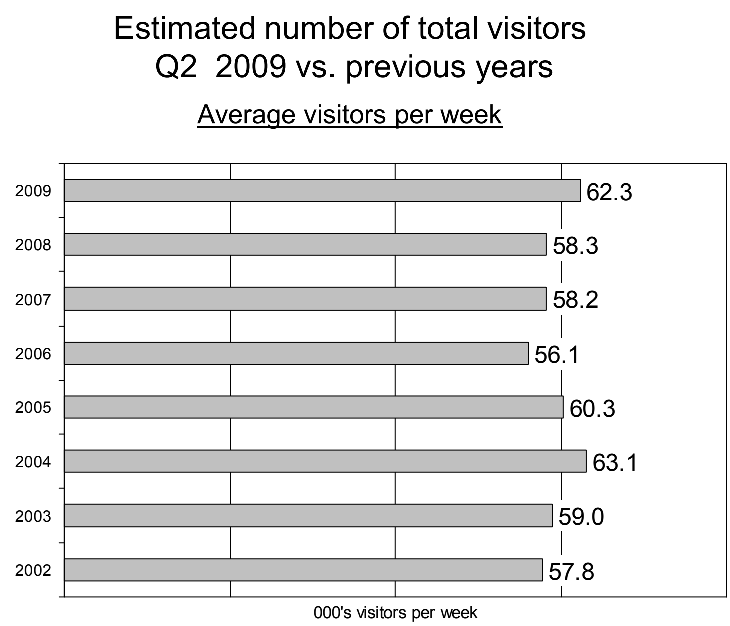
Weather data is supplied by IOW council and Medina Valley Centre

Total travel across the Solent

Total travel (residents and visitors combined) increased by 4% versus last year, returning to the level seen in 2007. The increase was fuelled by increasing numbers of visitors to the Island; travel by residents was level with spring 2008.

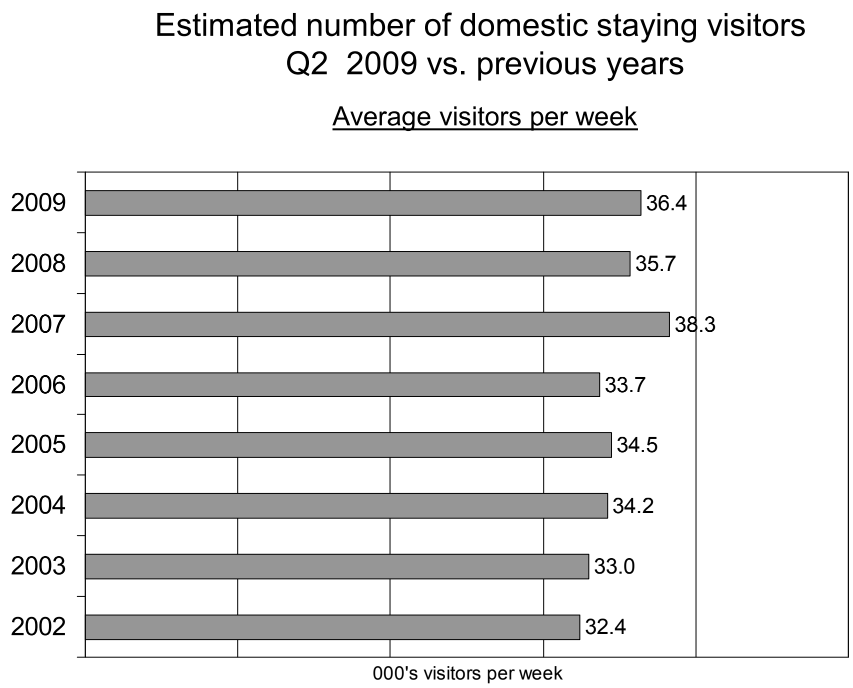
Total visitors to the Island (domestic and overseas visitors combined)

It is estimated that almost a million visits were made to the Island during this quarter, which is a weekly average of 62,000. This is an increase of almost 7% on 2008 and takes visits to the highest level seen in spring over the last 5 years. The vast majority of these visitors were domestic visitors (94%).



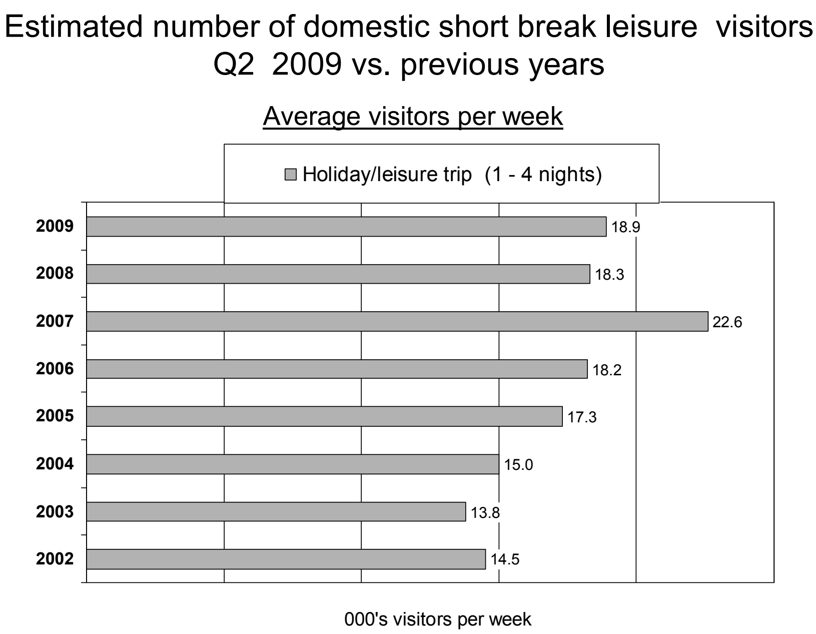
Domestic staying visitors to the Island

An estimated 582,000 domestic staying visitors came to the Island in spring, as shown in the chart below. This is equivalent to just over 36,000 per week, which is up slightly on last year (+2%). The volume of staying visitors remains below 2007 (-5%) but is ahead of 2006 and earlier years.



At this time of year the most important reason for visiting the Island is for a short break or short leisure trip (1 – 4 nights). It is estimated that there were over 300,000 short breaks taken on the Island, an average of nearly 19,000 per week. This is up slightly on 2008 (+3%) and on 2006 (+4%) but down on the peak year of 2007 (-16%).

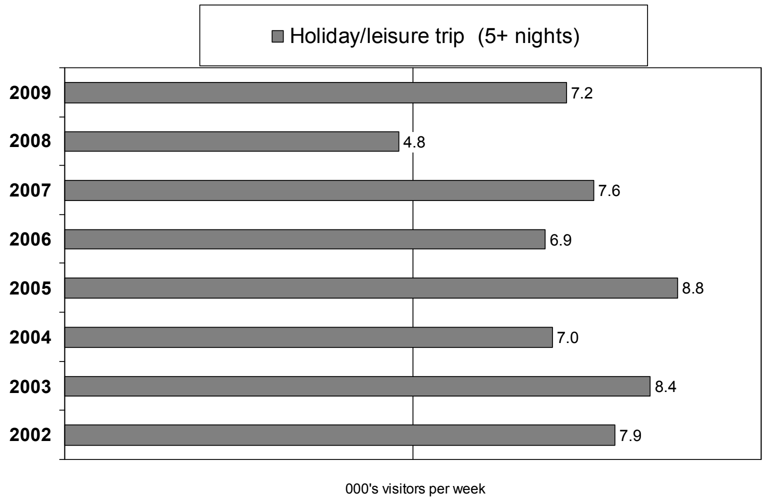
Over the long term the trend is towards an increase in short breaks during the spring period.



During spring, a much smaller number visit the Island on a longer holiday (lasting 5+ nights) than for a short break. This year there were 115,000 longer holidays, an average of just over 7,000 a week. This is a significant increase on last year (+49% but this equates to an increase of 2,400 per week) and takes longer holidays back towards the volumes seen in 2007 and 2006. However it should be noted that the unusually early Easter last year impacted on long holidays in the spring.

Estimated number of domestic longer stay holiday visitors
Q2 2009 vs. previous years

Average visitors per week

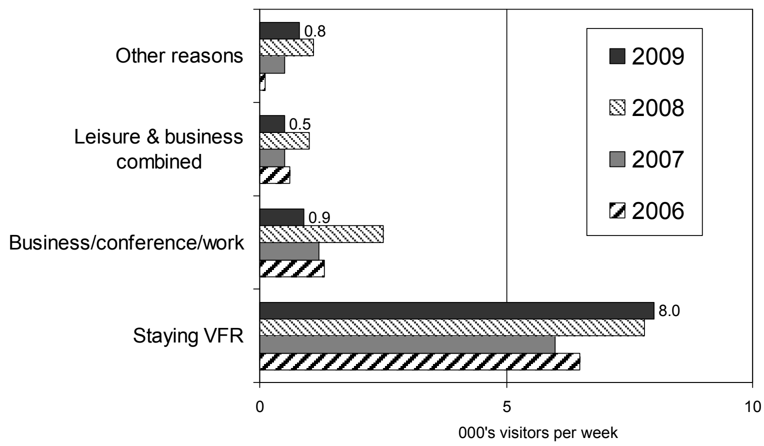


Other reasons for visiting the Island on a staying trip are shown below. During spring the most important reason is to visit friends/relatives: these accounted for 128,000 visits, an average of 8,000 per week which is up slightly versus last year (+3%).

There were almost 23,000 business trips (taking pure business and leisure/business together), this is 60% down on last spring, but similar to 2007[1]. Both categories of business trip reduced in volume.

Purpose of other domestic staying visits
Q2 2009 vs. previous years

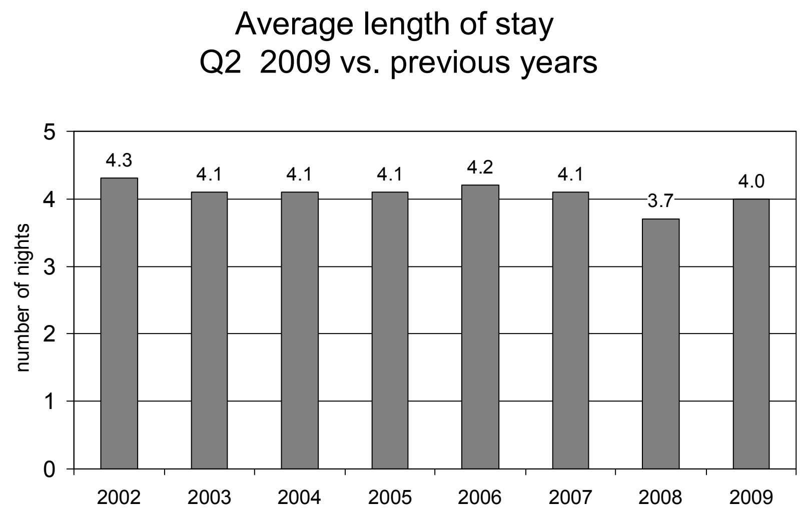
Average visitors per week



[1] N.B. sample sizes are fairly small resulting in fluctuations in data from year to year

Average length of stay (domestic visitors)

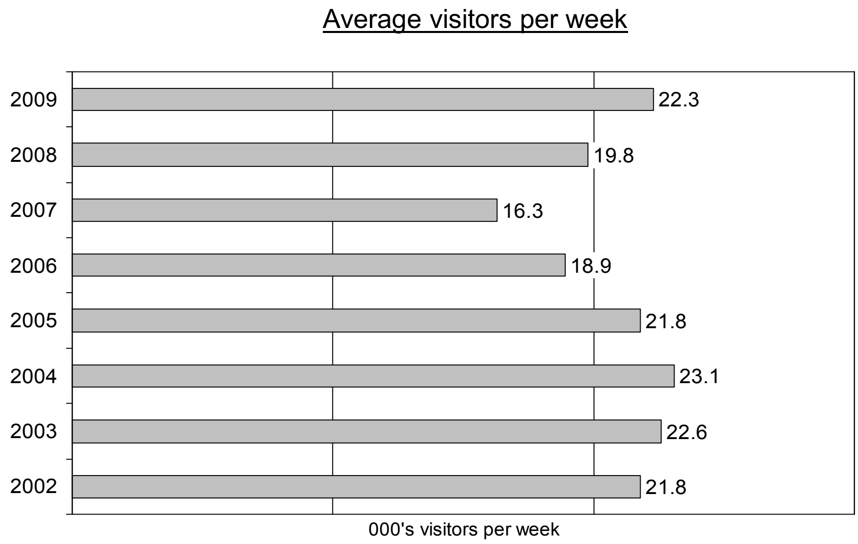
With the exception of last spring, the average length of all types of staying trips has remained fairly constant at around 4 to 4.2 nights over the last seven years. This spring it was back in line with the norm at 4.0 nights.



Domestic day visitors to the Island

An estimated 357,000 domestic day visitors came to the Island, an average of 22,000 per week. This is a significant increase on last year (+ 13%) and 37% up on the low point recorded in 2007. Domestic day visitors have now returned close to the volumes seen at the previous peak in 2004.

Estimated number of domestic day visitors
Q2 2009 vs. previous years



The overall increase in day trips is due to an increase in leisure day trips taken whilst on holiday, business day trips and visits to friends/relatives, as shown on the chart overleaf.

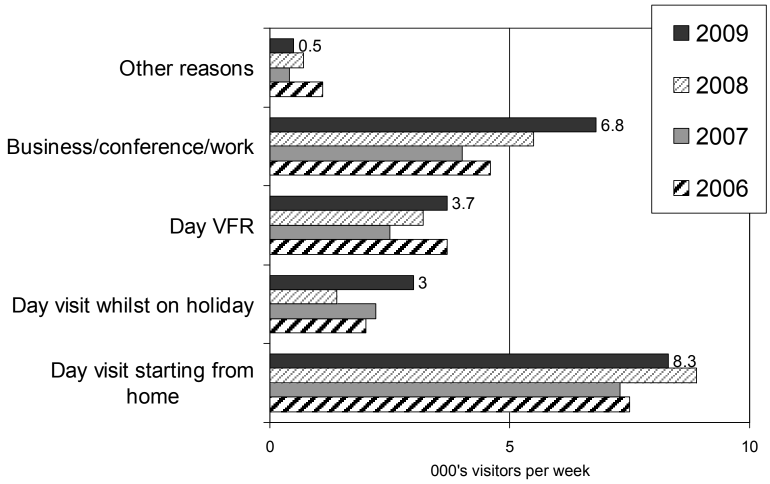
Leisure day trips (either from home or taken whilst on holiday on the mainland) were the most important reason for visiting the Island. These were predominately day trips starting from home, 133,000 or 8,300 a week; there were 48,000 (3,000 a week) visits made by people on holiday on the mainland. Leisure day visits are up by 10% versus last year, due to an increase in visits made by those on holiday rather than visits starting from home.

There were 59,000 day trips to visit friends/relatives, an average of 3,700 a week, which is up 15% versus last year.

An estimated 108,000 business day trips were made, 6,800 a week, which is up by 23% on last year and a significant increase on the previous two years.

Purpose of other domestic day visits
Q2 2009 vs. previous years

Average visitors per week



Overseas residents

An estimated 57,000 overseas residents visited the Island, an average of 3,600 per week. This is a similar volume to 2007, recovering from the reduction last year. 47,000 were staying visitors and 10,000 came on a day trip.

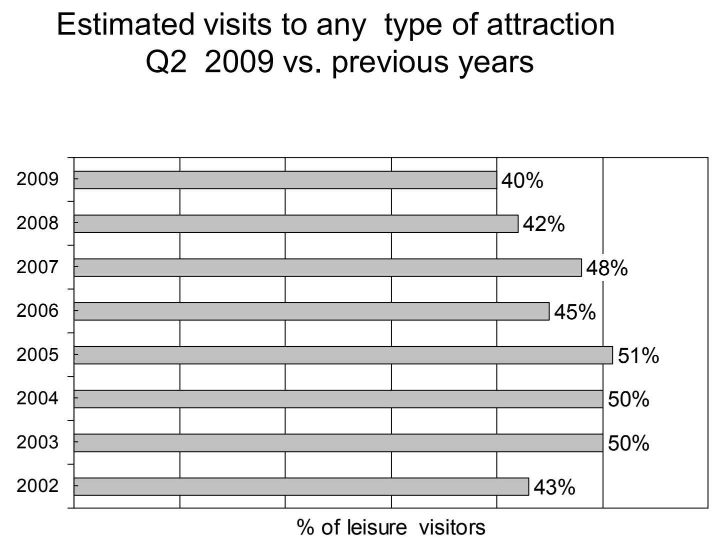
N.B. sample sizes are fairly small resulting in fluctuations in data from year to year

Visitors to the Island attractions

An estimated 40% of leisure visitors went to an attraction this spring. This was slightly lower than spring last year and significantly lower than recent years when visits to attractions have been made by 45 – 50% of leisure visitors. However, this year there was an increased tendency to visit both free and paid for attractions, hence the number of overall visits increased.

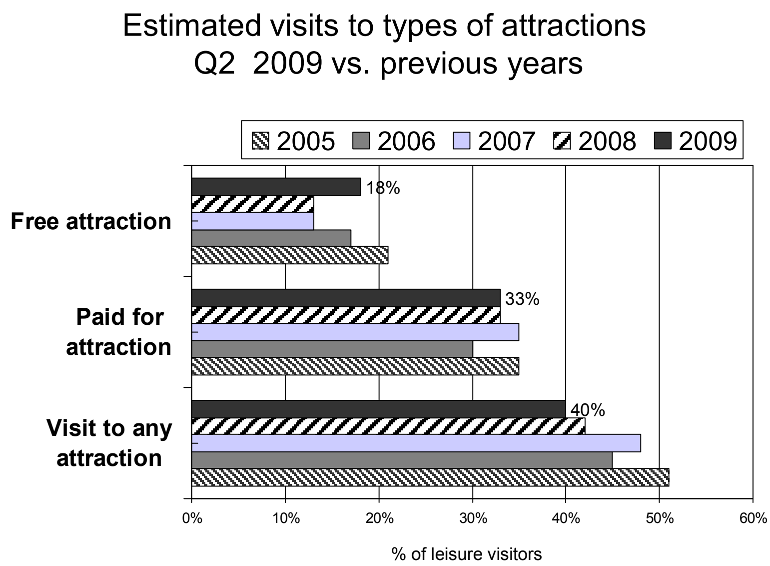
The propensity to visit is higher amongst some groups:

- Staying leisure visitors are more likely to visit than day leisure visitors (47% vs.30%)
- Groups including children are more likely to visit than adult only groups (51% vs.38%)
- Those on holidays and short breaks are more likely to visit than staying VFR (62% vs.23%).



* N. B. Recall of visits to free attractions may be underestimated due to the reliance on respondent's recall.

Despite the decline in overall visits, visits to free attractions increased by 5 points to 18% of leisure visitors. Visits to paid for attractions remained level with last year.



New versus repeat visitors to the Island

Day and staying leisure visitors are asked when they last visited the Isle of Wight. The following data excludes those visiting friends and relatives as these would skew the results - they are, by definition, likely to be frequent visitors. (5% of VFR visitors were on their first visit to the Island.)

During this spring period the Island attracted a good mix of new/lapsed and regular visitors. A base of regular leisure visitors indicates a high degree of visitor satisfaction and the Island clearly performs well here, but this visitor base needs to be refreshed with new/long term lapsed visitors to prevent an over reliance on a specific segment – this is particularly true during a difficult economic period when regular visitors' circumstances may change.

- Leisure day visitors: 45% of leisure day visitors were on a second or subsequent visit during the last 12 months and 23% returned after a short break (1 – 5 years). This means that a third were either new visitors to the Island (15%) or had decided to return after 5 or more years (17%). This is a slight increase - up by 3 points from last year (32% vs. 29%).
- Staying leisure visitors: 38% of these visitors were on a second or subsequent visit in the last 12 months and 23% came back after a break of 1 – 5 years. Almost two fifths (39%) were new/lapsed visitors: 20% were visiting for the first time, which is up from 16% last spring; 19% were returning for the first time in 5 years, level with last spring.

	Leisure day visitors (not VFR)	Short break/holiday visitors (not VFR)
First visit to Island	15%	20%
Visited before in last 12 months	45%	38%
Visited before 12 months to 5 years ago	23%	23%
Visited before but more than 5 years ago	17%	19%

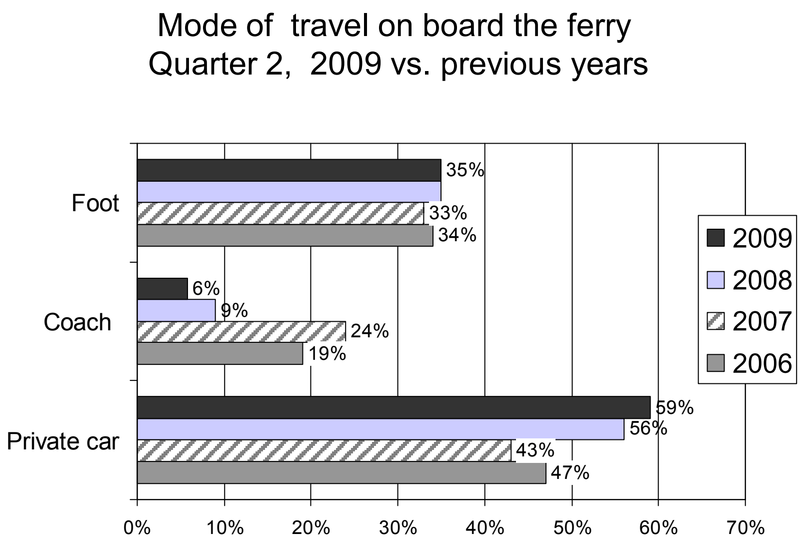
Based on these percentages, an estimate of the numbers of new and lapsed visitors can be made. Approximately 235,000 new or lapsed (5+ years) leisure visitors came to the Island, the majority were on a short break or holiday (173,000); approximately 62,000 were on a leisure day visit.

Mode of transport

All visitors are asked how they travel to the mainland terminal and around the Island. Mode of travel on board the ferry is also recorded and used to estimate the overall split between visitors travelling as car, coach and foot passengers.

Mode of travel on board the ferry

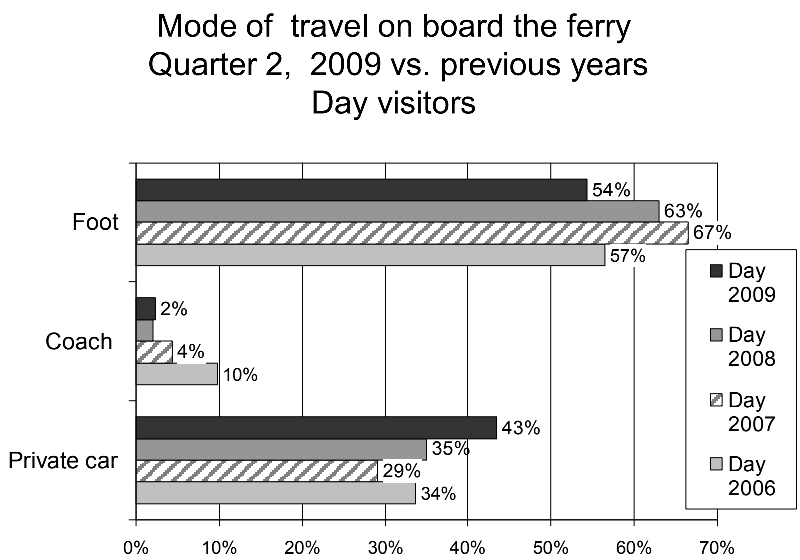
The trend towards travel by car has continued: this spring there was a small rise in car accompanied travel (59% travelled by car). A third travelled as foot passengers, level with the last three years. Travel by coach reduced slightly, down to 6%; this is a significant fall versus 2007 when almost a quarter travelled by coach.



Mode of travel on board differed between day and staying visitors.

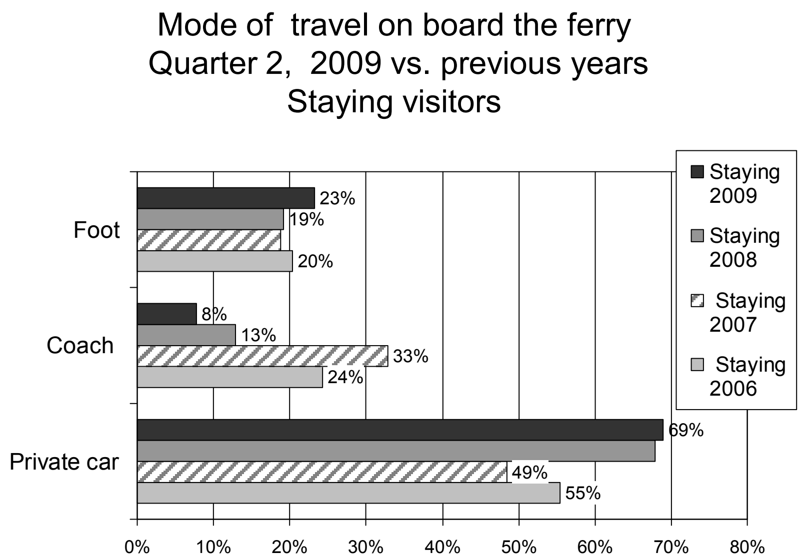
Day visitors

Just over half of the day visitors travelled on foot, 54%, the remainder used a car (43%). Travel by coach was negligible amongst day visitors. This is a significant change from previous years with a large shift from foot travel to car travel.



Staying visitors

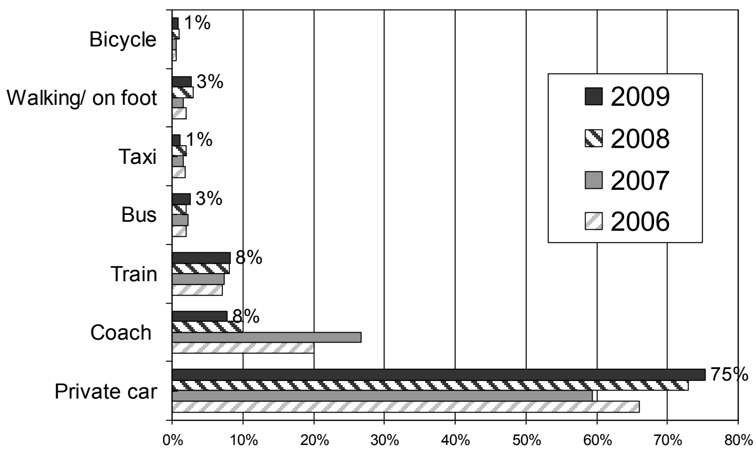
Two thirds of staying visitors travelled by car, 69%. This is in line with the proportion last year but up significantly on the previous two years. This increase has come from the coach accompanied market which has seen a corresponding decline over recent years. Travel on foot increased from 19% to 23% this year.



Mode of transport to the mainland terminal

The majority travelled to the mainland port by car (75%); this is up slightly from last year and a significant increase on the previous two years. 8% travelled by coach, down 2 points from last year. Another 8% travelled by train. A minority travelled by bus (3%).

Transport used to travel to the mainland terminal
Q2 2009 vs previous years

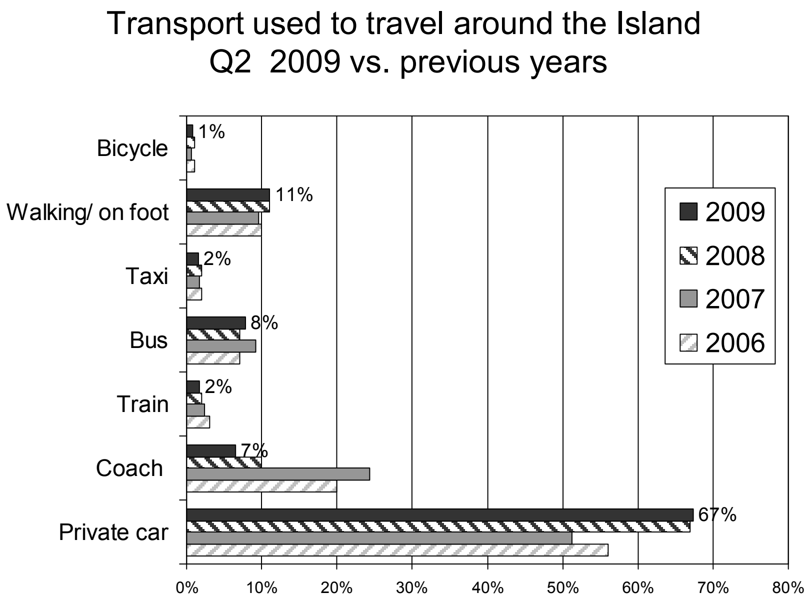


N.B. It is assumed that anyone travelling with their own car on the ferry uses that as their main mode of transport to the port. Likewise, those travelling with a coach on the ferry are assumed to travel by coach to the port.

There is little difference between mode of travel to the port used by day and staying visitors except that staying visitors were more likely to travel by coach than day visitors and day visitors made a little more use of the train or walking.

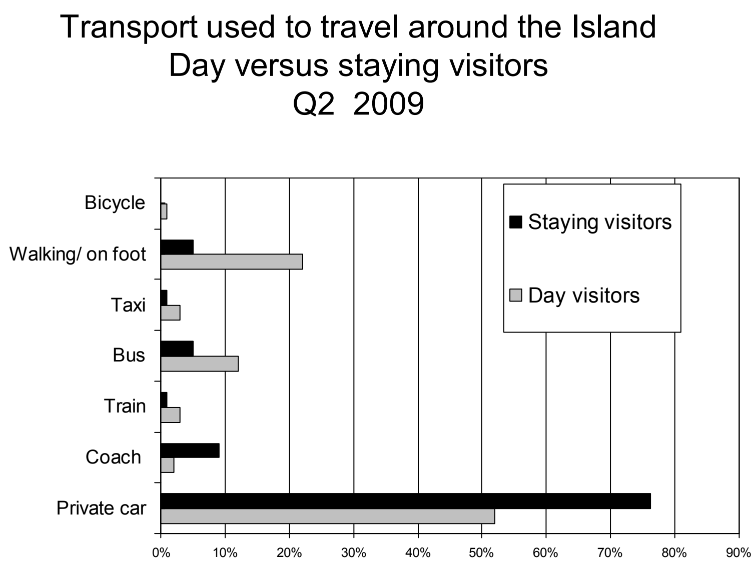
Mode of transport to travel around the Island

Private car is the preferred mode of travel around the Island: two thirds of the visitors travelled by private car (either their own or that of a relative). Use of a car is level with last year but up significantly on the last two years. Coach travel decreased by 3 points to 7%. 11% were walking, level with last year; 8% used local bus services and 2% used Island trains.



Day and staying visitors differ in their mode of travel around the Island:

- Day visitors: over a fifth said their main mode of transport was on foot and they were four times more likely to be walking than staying visitors. They also made use of public transport: 12% used local buses; 3% used the train. Only half used a car.
- Staying visitors: the majority travelled by road. Over three quarters travelled by car and 9% used a coach; 5% used local buses.



N.B. It is assumed that anyone travelling with their own car on the ferry uses that as their main mode of transport around the Island. Likewise, those travelling with a coach on the ferry are assumed to travel by coach on the Island.

Value of tourism

Tourism spend is estimated to be just under £170 million for the spring of 2009. Adjusting for the quarter length, this equates to an average weekly spend of £10.6 million which is an increase of 6% in the weekly average (excluding the effect of inflation). This increase has been achieved primarily by attracting more staying visitors – both domestic and overseas: it is those on holidays (short breaks and longer holidays) in particular who boosted the spend. Spend from day visitors has also contributed to this increase but the average spend per day visitor is much lower than for staying visitors.

The value of staying trips is estimated at £155 million and day trips at £14 million.

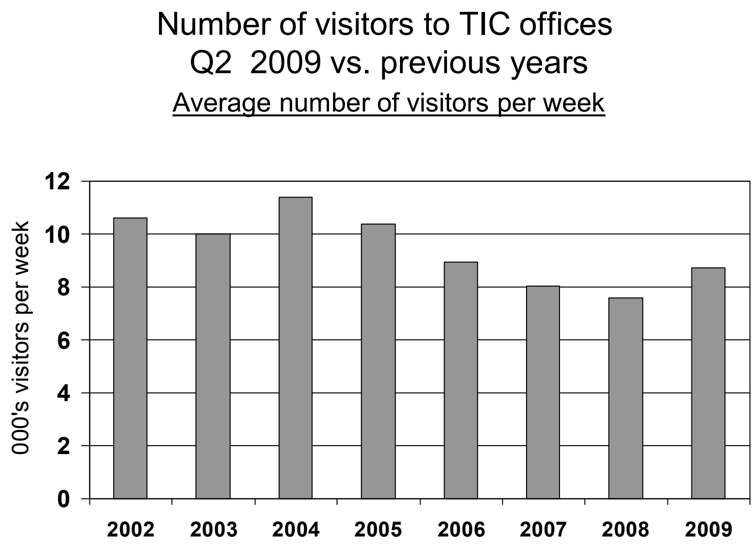
Staying trips	Total spend*	Weekly average*
All domestic staying trips	£136 million	
All overseas staying trips	£19 million	
All staying trips	£155 million	£10 million
Day trips		
All domestic day trips	£13 million	
All overseas day trips	£0.4 million	
All domestic day trips	£14 million	£1 million

* Individual figures are rounded to the nearest £million.

N.B. Spending by visitors arriving by yacht is not included in this calculation.

Activity at Island Tourist Information Centres

139,000 people visited the Island's TIC's across this quarter, an average of 8,700 per week. This is an increase of 14% versus last year and reverses the trend away from visiting TIC's in person seen over recent years. Average spend was £13.74, up very considerably versus last year due to an increase in the sales of high value tickets for events (sales include sales to Island residents and to visitors).



Website activity: islandbreaks.co.uk

There were 314,000 visits to the website in the spring period, an average of 19,600 per week. This is a fall of 1% versus the spring period last year.

Occupancy statistics

The Isle of Wight occupancy statistics for spring 2009 will be issued in a separate bulletin.

Summer peak season tourism bulletin (20th July to 6th September, 2008)

Visitor statistics for the peak season period will be circulated in October and the occupancy bulletin in November.